

REQUEST FOR PROPOSALS

Washington State Asset Building Pilot Projects

August 8, 2006

INTRODUCTION

Over the past 10 years, asset development has emerged as a potent and proven strategy to advance the lives of working low and moderate-income households. In other states and regions, policies backed by an array of state, federal and private funds are supporting actions that improve the financial savvy and decisions of low and moderate income people, resulting in increased savings, investing and making purchases to better their lives.

As part of our work to increase asset building actions and outcomes across the state, CTED is offering planning and start-up funds to communities via the proposal process below. Funding and direction for these grants was provided by the Legislature under HB3156, [link here](#). The bill gives you background on legislative intent and purpose.

We plan on offering approximately \$80,000 (looking for proposals in the \$7,000-\$15,000 range) in total funds for 6 –10 small grants. We have some state funds that we will also combine with a modest amount of state administrative CSBG funds. Community action agencies will be the lead organization to submit a simple proposal to us to fund activities to start-up or expand asset building in your communities.

The attached application will be due September 15, 2006. Decisions will be made quickly so that work can begin in October.

Date Funds Available: October 1, 2006 through June 30, 2007. Some contracts will be available through September 30, 2007.

Who May Apply:

Per the legislation, community action agencies in Washington state are eligible to apply. However, any local organization may be designated in the application as the lead for your community's asset building work. Developing a coalition of community partners around asset building is expected as part of your work.

Purpose of RFP:

The purpose of these grants will be to provide seed funds for your local asset work. Activities could include any of the following:

- Planning and organizing local asset building campaigns and coalitions;
- Financial literacy marketing, training and coordination;
- Earned Income Tax Credit promotion and voluntary tax filing assistance;
- Developing Individual Development Accounts programs; and
- Lowering the costs of financial services and products and improving bank account and savings rates for low-income households.

Washington State Department of Community, Trade and Economic Development
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The application process is meant to be simple, but does require input and collaboration from your local partners. Your application should be less than 10 pages in length – please be succinct yet specific in your narrative.

Application deadline:

Proposals by regular mail or email must be ***received*** by 5:00 p.m., **Friday, September 15, 2006** at:

**Washington State Department of Community, Trade and Economic Development
Community Services Division
906 Columbia St SW, 2nd Floor
P.O. Box 42525
Olympia, WA, 98504-2525
Attention: Paul Knox
<mailto:paulk@cted.wa.gov>**

NOTE: All emailed applications must be in one single file in the correct order for reading, including attachments.

TIMELINE and DELIVERABLES

August 8, 2006

- RFP made available (e-mail, web, etc.)
- Please have your lead notify Paul Knox via email if you are a potential bidder and want to be placed on the email list for future updates. (Note: even if you do NOT notify CTED that you are a potential bidder, you may still submit an application).

September 15, 2006

- Deadline for Application submission to CTED.

September 22, 2006

- Proposal review and rating by CTED panel
- Be available to answer questions and/or negotiate with CTED RFP reviewer.

September 27, 2006

- Final decisions made and applicants contacted

September 29, 2006

- Contracting process begins – with completion by October 6, 2006

October 2006 – October 2007

- CTED will convene periodic sessions (in-person and electronically) for pilot sites and existing local asset coalitions to learn from one another and check on progress and initial outcomes. Each pilot site will be responsible for submitting a short report at the end of their contract period describing project outcomes, challenges and future plans.

Selection Process

CTED is particularly interested in funding proposals for asset building work where none or little activity currently exists. Criteria to be used in the selection process include:

- ◆ Quality and completeness of project design and implementation plan, including ample size to ensure economies of scale for program administration;
- ◆ Demonstrated need for asset building work in designated area;
- ◆ Clear and ample plan for linkages to existing programs and resources;
- ◆ Demonstrated ability to work with targeted customers and necessary partners;
- ◆ Cost-effectiveness and reasonableness of financial projections as related to project design; and
- ◆ Capacity to provide or raise additional funds for developing sustainable local asset building activities.

Resources

An array of individuals and organizations can provide expertise and examples for communities proposing to start-up or expand their asset development activities. Communities that have developed asset building coalitions that are engaged in a variety of actions include (with contacts):

Seattle -- King County

- Lead: United Way of King County; Dave Sieminski, <mailto:dsieminski@uwkc.org>

Tacoma -- Pierce County

- Lead: Associated Ministries; Barbara Gorzinski, barbarag@associatedministries.org

Spokane

- Lead: Spokane Neighborhood Action Programs; Kerri Rodkey, <mailto:rodkey@snapwa.org>

Please also email Paul Knox at CTED, paulk@cted.wa.gov if you have questions and/or desire consultation about your plans. Any significant answers or information will be shared with all local leads who notify us about their intent to apply.

Additionally, a host of web-sites can provide information including:

Corporation for Enterprise Development

<http://www.cfed.org/>

Center for Social Development

<http://gwbweb.wustl.edu/csd/asset/index.htm>

APPLICATION QUESTIONS

- A. **APPLICANT SUMMARY:** Clearly and concisely summarizes your request. – what do you intend to do and how will you do it. Please include the problem, objectives, and methods. Include total cost of the project, and the amount you are requesting.

Contact Information – Project Lead

Name/Title:

Name of Organization:

Mailing Address:

Telephone/Email Contact Information:

Title of Proposed Project/Program/Initiative:

Total cost of project: \$ Amount requested: \$

Signed: _____

(Executive Director; please print name and sign here; Printed name is acceptable by email).

- B. **PARTNERS:** Please describe your organization and its qualifications for funding, name your partners and their roles and explain how you intend on working together toward your shared goals. You may attach letters of support.

- C. **PROBLEM STATEMENT OR NEED:** Identify your area's asset development needs based upon input from your partners and others in your community.

- D. **OBJECTIVES & ACTIONS:** Please describe the principal goals and objectives, activities and outcomes of your proposed asset building work. Identify the geographic area and the targeted population that will benefit. **Include a matrix and timeline of your project – what steps will be accomplished, by when and by whom.**

- E. **RESOURCES:** Please describe the financial, human and organizational resources in your community that will or may support your ongoing asset building activities. Describe staffing of your project. Describe how you envision achieving asset building objectives beyond the period of this proposal.

- F. **IMPROVEMENT AND MARKETING:** How will you ensure that mid-course adjustments are made to ensure you meet your outcomes? Also present a public relations strategy to share results of the project with your community and other relevant groups and stakeholders.

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G. BUDGET (10 points): Using the attached budget format, clearly delineate costs to be met by the funding source and those provided by other parties. Include any relevant budget narrative here:

BUDGET

I.	PERSONNEL	Requested	Other Sources	Total
	A. Salaries and Wages			
	B. Fringe Benefits			
	C. Consultant and Contract Services			
II.	NON-PERSONNEL			
	A. Direct Client Services			
	B. Space			
	C. Rental, Lease, Purchase of Equipment			
	D. Marketing costs, Supplies			
	E. Travel			
	F. Other Costs			
III.	INDIRECT COSTS			

TOTAL PROJECT COST: